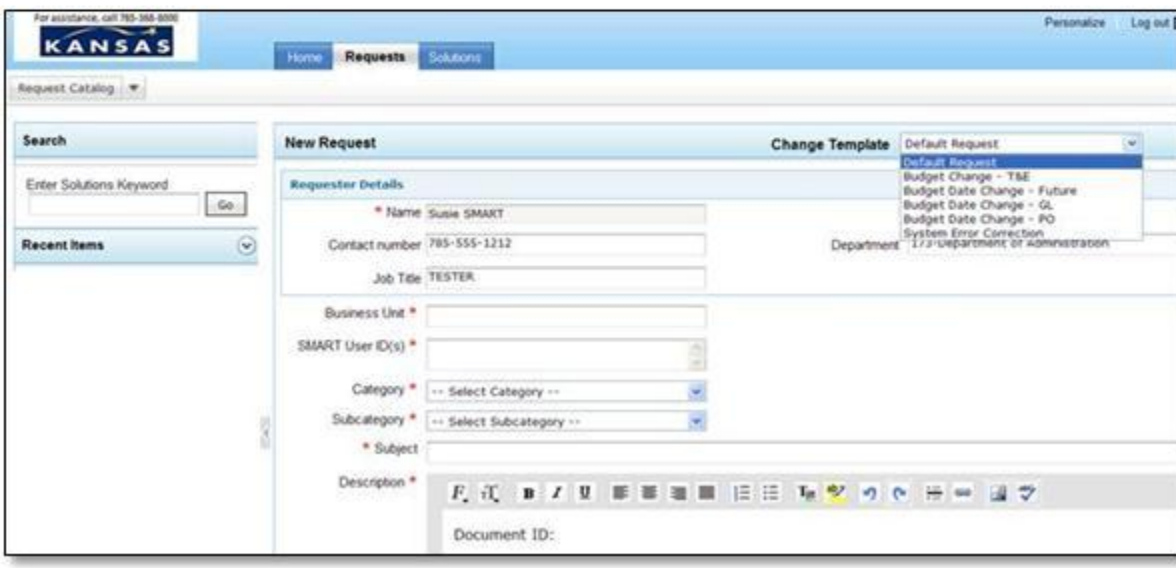
A new category, four (4) new subcategories and four (4) new templates have been created in the Service Desk to help capture sufficient information in relation to budget date change requests. A template has been created for each reason that an agency may need to request a budget date change:

> **Budget Change – T&E:** This budget date change is being requested because an expense report has been created in the current fiscal year for expenses occurring in a prior fiscal year, no travel authorization is available and a GL encumbrance is being utilized.
>
> **Budget Date Change - Future:** This budget date change is being requested because the agency needs to ensure that a July payment can be made within a few days of the new fiscal year (July 1st). Agencies will be able to enter next fiscal year requisitions once the requisition module has been opened in SMART (May 1st); however, the service desk request for the budget date change should be submitted after the PO module has been opened in SMART (June 1st). Agencies may submit a list of requisitions on one (1) service desk request. More information is available in the annual year end information circular.
>
> **Budget Date Change - GL:** This budget date change is being requested because all or a portion of a GL encumbrance has been released to allow a prior fiscal year requisition to be entered and processed.
>
> **Budget Date Change - PO:** This budget date change is being requested because a prior fiscal year PO has been set up incorrectly resulting in remaining budget that cannot be used. [Example: the Amount Only check box was not selected on the PO line and the total quantity has already been vouchered resulting in a fully matched PO with a remaining encumbrance.] In this case, the PO must be closed and a new requisition issued to continue processing.

Agencies can submit a Budget Date Change from the Home page or from the Requests page.

Home Page
Select the 'Request Catalog' drop down button and select one (1) of the following template options: **Budget Change – T&E, Budget Date Change – Future, Budget Date Change – GL or Budget Date Change – PO.**

Requests Page
Select the 'Change Template' drop down button and select one (1) of the following template options: **Budget Change – T&E, Budget Date Change – Future, Budget Date Change – GL or Budget Date Change – PO.**



Selecting a template will auto populate the Category, Subcategory and subject fields. In the 'Description' area, the agency will see a brief explanation of the Budget Date Change request reason which is followed by a list of questions that the agency must respond to when creating the service desk ticket. Below you will see the information agencies will need to provide for each budget date change reason.

> **Budget Change – T&E:** This budget date change is being requested because an expense report has been created in the current fiscal year for expenses occurring in a prior fiscal year, no travel authorization is available and a GL encumbrance is being utilized.

- Business Unit:
- GL Journal ID being reduced (Encumbrance):
- GL Journal ID needing the budget date change:
- Expense Report ID:
- Budget Date for Fiscal Year (the budget date will be entered as 06/30/YYYY):

Budget Date Change - Future: This budget date change is being requested because the agency needs to ensure that a July payment can be made within a few days of the new fiscal year (July 1st). This will only occur from the date the requisition July period is open to the last day the system is available to agencies within the current fiscal year. More information is available in the annual year end information circular.

- Business Unit:
- New Requisition ID:

Budget Date Change - GL: This budget date change is being requested because all or a portion of a GL encumbrance has been released to allow a prior fiscal year requisition to be entered and processed.

- Business Unit:
- GL Journal ID (Encumbrance):
- Requisition Number / Line Number:
- Budget Date for Fiscal Year (the budget date will be entered as 06/30/YYYY):

Budget Date Change - PO: This budget date change is being requested because a prior fiscal year PO has been set up incorrectly resulting in remaining budget that cannot be used. [Example: the Amount Only check box was not selected on the PO line and the total quantity has already been vouchered resulting in a fully matched PO with a remaining encumbrance.] In this case, the PO must be closed and a new requisition issued to continue processing.

- Business Unit:
- Original PO (the PO which has been closed):
- New Requisition ID:
- Detailed description of PO issue:
- Budget Date for Fiscal Year (the budget date will be entered as 06/30/YYYY):

NOTE: Requests for Budget Date Changes should be submitted at the **requisition** level for the last three (3) Budget Date Change reasons. Select the **'Save and Preview'** button on the **requisition** and then submit the service desk ticket requesting the Budget Date Change. Once the budget date has been updated the service desk request will be closed and the agency will need to go back to the requisition and select the 'Save & Submit' button. The updated Budget Date will flow from the requisition to the Purchase Order.

Thank you

The SMART Team